CASTLEPOINT
WEALTH ADVISORS

Client Services Administrator (CSA)

Castlepoint Wealth Advisors is a leader in the wealth management industry and has become a career destination for talented professionals. Our unique work culture promotes teamwork, professional growth and an engaging environment.

Our core purpose is to build happier and more prosperous lives. We believe a healthy work/life balance is essential – happy team members provide the best possible service to our clients.

We are hiring a Client Services Administrator to join our talented team to help us continue to deliver great value to clients.

Job Description

We are looking for an individual who works well in a team and fast-paced environment and is committed to providing superior service. This person will primarily administer, support, and coordinate all activities related to serving our clients and team.

Duties & Responsibilities

- Deliver exceptional service to clients, including but not limited to:
    - Preparing and managing paperwork for account openings, account maintenance, and asset transfers
    - Accurately setting up and maintaining client information across all internal systems
    - Organizing and maintaining client records in a clear and compliant manner
    - Providing ongoing support and proactive service to meet client needs
    - Facilitate money movements and transaction requests in a timely and secure manner
    - Responding promptly to client inquiries to ensure a high level of care and satisfaction
- Serve as a liaison between clients and advisors:
    - Handling routine service requests and general inquiries with efficiency
    - Providing administrative support prior to client meetings, and execution of meeting follow-up tasks
- Maintain a consistent in-office presence: Monday through Thursday from 8:00 AM to 5:00 PM, and Friday from 8:00 AM to 12:00 PM

We will hire the person who best embodies and embraces the Castlepoint Core Values:

+ **Lifelong Learning**
  Maintain a beginner's mind and develop the necessary skills and expertise to excel in our profession.
+ **Serve with Excellence**
  Honor others by exceeding expectations.
+ **Have Fun!**
  A fun and flexible workplace allows us to pursue happiness in our own lives.
+ **Seek Simplicity**
  Reduce complexity so we can focus on what matters most for clients.
+ **Team-Minded**
  When we move forward together, success takes care of itself.
+ **Lead with Integrity**
  Lead by example and always do the right thing.

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Qualifications

We would strongly prefer these qualifications in this position:

- Strong attention to detail and accuracy
- Dedicated to a client-first mindset with a servant-hearted approach
- Proficient in Microsoft Office Suite; including Word, Excel, PowerPoint, Outlook
- Comfortable working with financial systems, forms, and documentation

What we offer:

- Salary based on industry standards and experience
- Bonus potential
- Paid time off
- Benefits include health insurance and retirement plan - 401(K)

How to Apply →

Interested applicants should send their resumes with a cover letter to **reagan@castlepointwealth.com.** We will contact you if we believe your qualifications meet our needs. Thank you!

Castlepoint Wealth Advisors is an Equal Opportunity Employer

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